

# **Collaborative Project Management with Documentum eRoom**

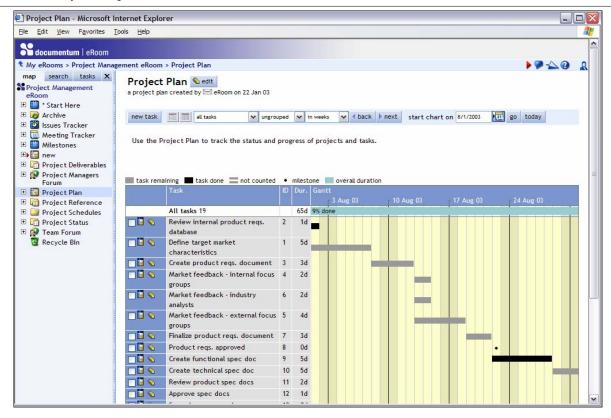
Effective project management lies at the heart of every successful manager's job. When projects demand a rapid response to meet key business milestones, Documentum eRoom delivers by giving managers and executives a suite of project management and decision-making tools that enable them to strategically apply scarce resources and maximize project effectiveness. The end result is that organizations are able to bring products to market faster and more efficiently, streamline relationship management across their value chain, and optimize internal project management operations.

Documentum eRoom provides
distributed teams with a complete set of
project management tools to facilitate
effective execution against defined
milestones. Project managers can view
information across multiple projects in
order to identify bottlenecks, resolve
issues, and coordinate program
initiatives.

## The Need for Collaborative Project Management

In order to meet the demands of customers and bring products to market quickly, organizations of all sizes must be able to manage projects efficiently and effectively on a day-to-day basis. As a result, companies face a number of project execution challenges, including the coordination of teams distributed across geographic and organizational boundaries, lack of visibility across project initiatives, lack of standardization in project delivery, and the need for a centralized project repository.

Documentum eRoom provides organizations with a flexible, end-user managed project collaboration solution designed to address their project management requirements. Collaborative project management goes well beyond tracking project schedules. It must capture all of the interactions within a project, including executing tasks, resolving issues, managing input from a variety of sources, and successfully completing project deliverables. eRoom delivers a wide range of capabilities intended to simplify project management and improve the efficiency of project execution efforts for distributed project teams. In addition, eRoom provides Web-based program dashboards for aggregating information and increasing visibility across projects to ensure alignment with an organization's strategic objectives. eRoom enables organizations to extend project management beyond PMO schedules to address the full range of collaborative interactions that drive the successful achievement of project milestones.



### eRoom Project Plan: A Project-Scheduling Engine

Documentum eRoom 7 delivers a new item type, the "Project Plan," specifically for purposes of project management. The Project Plan provides a native, Webbased project scheduling engine within the eRoom workspace to organize, manage, and report on complex and interdependent project tasks and milestones. The eRoom Project Plan provides quick visibility into structured data like task relationships and dependencies, resource availability, and progress reports on task status and completion – all within a flexible collaborative environment. Project schedules can be viewed in both Gantt chart and task detail format, providing a multi-dimensional view of task information.



Task details view of eRoom Project Plan information

Project managers can utilize this tool to capture and track all of the work items associated with a project. Knowledge workers can update and report on the progress of their own project items from within their collaborative work environment. eRoom notifies users when a progress report is needed and tasks have been assigned to them. Users can also track their personal tasks within the task section of the eRoom navigation pane.

Features and Capabilities: eRoom Project Plan

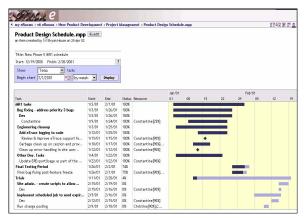
- Gantt chart and task details views
- Automated status and progress reporting
- Task categorization, grouping, and summaries
- Configurable time period views
- Set local time zones
- Configurable work day and holiday settings
- Attach files or any eRoom object to any task
- Add threaded discussions and polls to any task
- Maintain a change log for audit purposes

#### eRoom Viewer for Microsoft Project

In addition to the eRoom Project Plan, eRoom also offers the eRoom Viewer for Microsoft Project. Project managers across a broad range of industries leverage

eRoom in conjunction with Microsoft Project for project management purposes. In this context, project managers can utilize the sophisticated capabilities of Microsoft Project for scheduling purposes, while team members can access a personalized view of their Microsoft Project task lists directly within their collaborative eRoom workplace. The eRoom Viewer for Microsoft Project unites the broad functionality of eRoom's collaborative workspace with the specialized capabilities of Microsoft Project for project schedule management.

The eRoom Viewer for Microsoft Project is designed for environments where Microsoft Project is not available on every team member's desktop, but where team members still require access to up-to-the-minute project task information. This server-side Microsoft Project file viewer eliminates the sharing of outdated task information among project teams, keeping teams focused on hitting milestones and completing projects on time and on budget.



eRoom Viewer for Microsoft Project allows team members to view their tasks without requiring desktop software

#### eRoom Program Dashboard

eRoom Program Dashboard is designed to provide programmatic visibility dynamically across multiple projects, enabling team members, project managers, and executives to track key project information from a personalized portfolio view. Within the eRoom Program Dashboard, project data is rolled up from database templates utilized across multiple eRoom workplaces, providing detailed, real-time visibility into the status of each project. Deployed via a custom service engagement, companies can configure the business logic around status notification according to their specific application requirements.

Features and Capabilities: eRoom Program Dashboard

- Deployment within a portal environment
- Reusable templates and custom components

- Workplaces can span an entire eRoom site
- Dynamic status reporting with ability to set update intervals
- XML connectivity to eRoom database and calendar objects

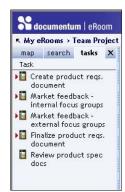
By combining personalized visibility into project status with one-click access to important data, project managers and executives can respond immediately to dynamic workplace conditions and maintain crucial deadlines for mission-critical business applications.

Additional eRoom Project Management Capabilities

In addition to the capabilities outlined above, eRoom provides a wide range of features designed to facilitate and streamline collaborative project efforts across distributed teams.

**Structured Approval Process Databases**: Teams can add structure processes to project efforts when review and/or approval is required to launch, advance, or complete a project. Project managers can create project templates, including approval processes, to standardize project delivery methodologies and improve efficiency across project teams.

Enterprise Databases: eRoom provides enterprise database capabilities out of the box to provide project managers with visibility across project teams. Any eRoom database can be leveraged as an enterprise database, providing a single summary view of project milestones, issue resolution, or project status information across multiple projects.

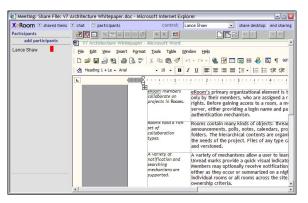


Personalized Task Summary: eRoom 7 provides a new, three-tab interface at the top of the navigation pane on the left of the interface. In addition to the display of the navigation map and the search interface, eRoom 7 adds a third tab that lets users see a personal view of their active tasks within the eRoom. This allows users to see their task list on the left of

the screen while working on the task details in the main window. This Task Summary page lists all entries from all databases and Project Plans in the eRoom to which a user is assigned, either directly or through a group or role, as an owner.

Real Time Services: eRoom Real Time Services provide project teams with integrated data conferencing capabilities integrated directly into their project workspace. Team members can come together in a real-time session to review deliverables, resolve issues,

and make decisions to advance project execution against defined milestones. In addition, team members can invite non-eRoom members to real-time meetings, gathering important outside input into decision-making processes, when necessary.



eRoom Real Time Services enables project teams to hold real-time data conferences to make decisions and resolve issues.

#### **About Documentum**

Documentum provides enterprise content management (ECM) solutions that enable organizations to unite teams, content, and associated business processes. Documentum solutions support the way people work, from initial planning through sales and service. With a single platform, Documentum enables people to collaboratively create, manage, deliver, and archive all types of content, from documents and discussions to email, Web pages, records, and rich media. With Documentum, organizations improve their competitive advantage by accelerating time to market, increasing customer satisfaction, and reducing operating costs. For more information about Documentum, visit <a href="https://www.documentum.com">www.documentum.com</a> or call 800.607.9546 (outside the U.S.: +1.925.600.6754).

#### Documentum, Inc.

6801 Koll Center Parkway Pleasanton, CA 94566-7047 phone (925) 600-6800 fax (925) 600-6850

www.documentum.com

© 2003 Documentum, Inc. All rights reserved. Documentum, and the corporate logo are trademarks or registered trademarks of Documentum, Inc. in the United States and throughout the world. All other company and product names are used for identification purposes only and may be trademarks of their respective owners. Documentum cannot guarantee completion of any future products or product features mentioned in this document, and no reliance should be placed on their availability. Printed in the U.S. A23250903V1

